

# Enterprise - How to Set up Employee Adjustments

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## What is an Employee Adjustment?

Withing Enterprise, we have the ability to set up reoccurring adjustments to an employee's pay. These are adjustments that would affect that individual's income, regardless of the customer that they are working for. Adjustment types would need to be setup directly on an employee's record.

One example of a common employee adjustment is a [child support adjustment](#). Some examples of adjustments on the employee record include, but are not limited to:

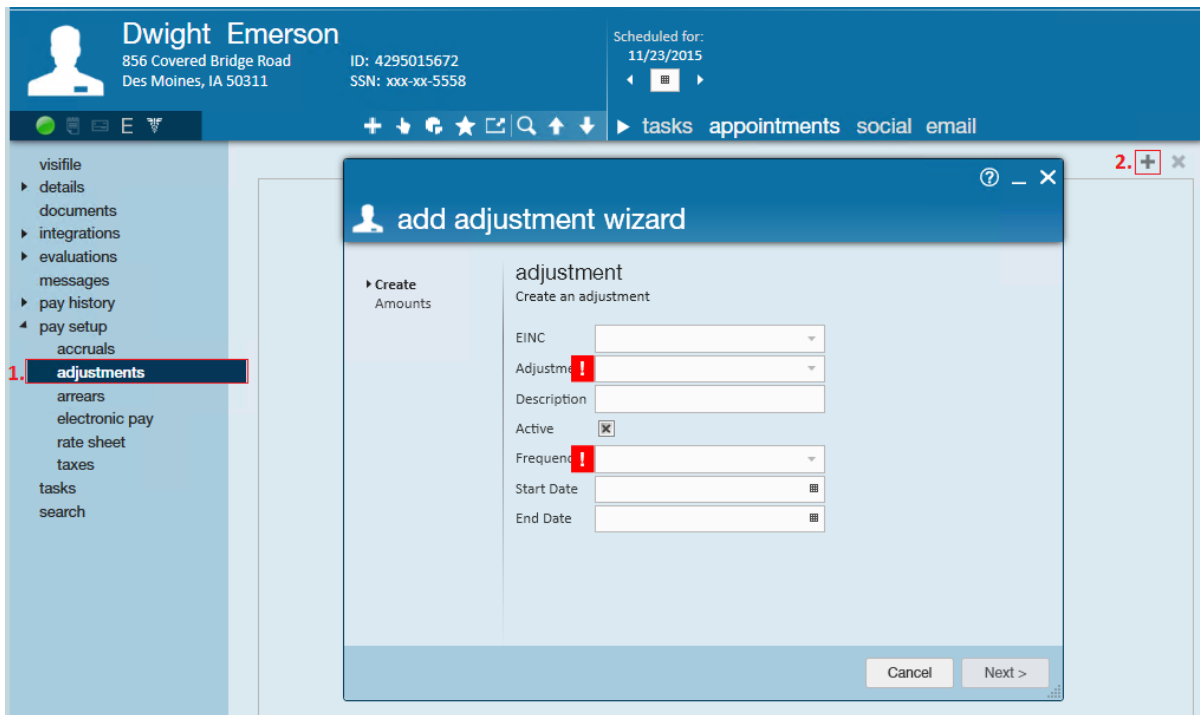
- Garnishments
- [Levy](#)
- [401K](#)
- [Medical and other Benefits](#)

Looking for a video? Check out [Payroll Part 2: Employee Adjustments](#)

## How to Add an Employee Adjustment

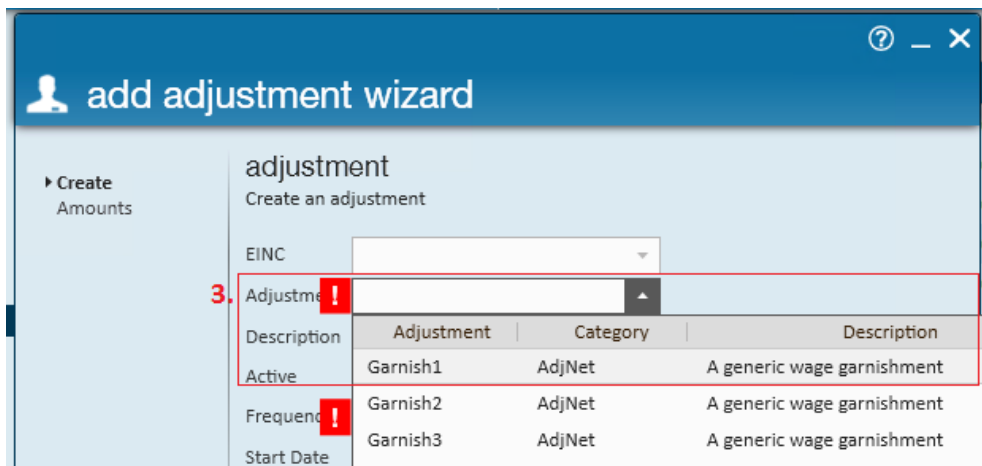
**\*Note\*** Adjustment types must first be set up by your Administrator before you can add it to an employee's record. Check out [How to Set Up Adjustments in Administration](#) for more information.

1. Navigate to the Employee Record that requires the adjustment and expand the pay setup section and select adjustments
2. Select the + icon to add a new adjustment



3. Enter the following information:

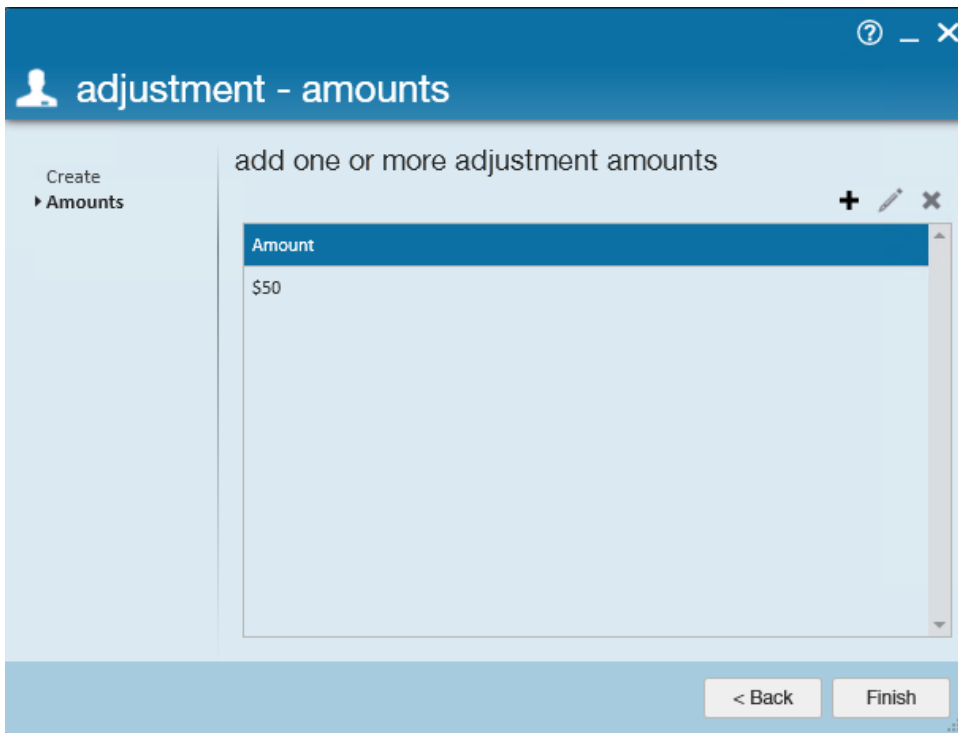
- o Select the adjustment type from the Adjustment dropdown (this should reflect the kind of adjustment you are adding, ex. child support, levy, etc.) Always ask your administrator if you are unsure which adjustment type to use.



- o Optionally, add a description (a note for any other payroll processors, etc.).
- o Under Frequency, use the drop down to select the frequency that the employee is paid (daily, weekly, etc.).
- o Optionally, add a start/end date. If the start date is later than today's date, enter a date. Otherwise, leave blank to start the adjustment immediately.

4. Once you have completed filling out the basic adjustment information, select Next to continue
5. Enter the deduction amount (either amount or percentage of paycheck)

- o Select the + in the upper right
  - o In this example, we are going to be deducting \$50 every week until the balance is repaid
  - o Consider setting a max deduction, especially if you are taking a percentage of every check to ensure you do not take more than a specified amount.
6. Select Save & Select Finish



Once you have entered your employee adjustment, you should select it again and ask yourself the following questions:

1. How Important is this Adjustment? (Sequence)
2. What is the Max that Can Be Deducted? (Period, Lifetime, etc. Max)
3. Where is the Money Going? (Authority or electronic pay)

### How Important is this Adjustment?

When an employee has multiple adjustments setup on their record, how does Enterprise know which adjustment to garnish first and which to garnish last? **Sequence!**

The sequence determines the priority of an employee's adjustments.

For example, the image below shows an employee that has multiple child support adjustments added in addition to our generic garnishment. Do the child support adjustments receive priority over the generic garnishment?

| EINC | Adjustment | Description | Active                   | Sequence |
|------|------------|-------------|--------------------------|----------|
|      | Garnish1   |             | <input type="checkbox"/> | 2        |
|      | ChildSupt4 |             | <input type="checkbox"/> | 1        |
|      | ChildSupt3 |             | <input type="checkbox"/> | 1        |
|      | ChildSupt2 |             | <input type="checkbox"/> | 1        |
|      | ChildSupt1 |             | <input type="checkbox"/> | 1        |

The answer to this is determined by each adjustments sequence. After sequence 1 adjustments are calculated if the employee has garnishable wages remaining. Enterprise will then move on to any adjustments with a sequence of 2.

This process will continue automatically until either the employee has no garnish-able wages left or all adjustments have been fulfilled.

The screenshot shows a software interface with a 'Main' tab and a 'Pay/Misc' sub-tab. The 'Adjustment' field is set to 'ChildSup1'. The 'Description' field is empty. The 'Sequence' field is highlighted with a red box and contains the value '1'. The 'Active' checkbox is checked. The 'Date Served' is '10/4/2018'. The 'Frequency' is 'Weekly'. The 'Max Monthly' is '\$0.00'. The 'Start Date' is empty. The 'Max Yearly' is '\$0.00'. The 'End Date' is empty. The 'Max Lifetime' is '\$0.00'. The 'Authority' is 'Belvard County'. The 'Period Max' is '\$50.00'. The 'Case Number' is '4568213'. The 'Min After Calc' is '\$0.00'.

**\*Note\*** If there are multiple garnishments on the employee's record that should be taken out equally, set them to the same sequence number (for example, multiple child supports). The system will try to take all the adjustments out together and if it can't, then it will try to distribute the money as equally as possible.

## What is the Maximum Amount that can be Deducted Per Pay Period?

Enterprise adjustments are tracked by **weekend date**. For example, let's say our employee turns in a timecard with 40 hours on it for the weekend date 12/6/2015. That timecard is processed by payroll and the full \$50.00 is garnished. Now, imagine if the employee turned in an additional timecard for the weekend date 12/6/2015 with 8 hours of additional overtime.

Processing that second timecard *without a period max* would garnish the employee's wages a *second time*.

The screenshot shows a software interface with a 'Main' tab and a 'Pay/Misc' sub-tab. The 'Adjustment' field is set to 'Garnish1'. The 'Description' field is empty. The 'Sequence' field is '5'. The 'Active' checkbox is checked. The 'Date Served' is '2/21/2019'. The 'Frequency' is 'Weekly'. The 'Max Monthly' is '\$0.00'. The 'Start Date' is empty. The 'Max Yearly' is '\$0.00'. The 'End Date' is empty. The 'Max Lifetime' is '\$500.00'. The 'Authority' is empty. The 'Period Max' is '\$50.00' and is highlighted with a red box. The 'Case Number' is empty. The 'Min After Calc' is '\$0.00'. On the left side, there is a section titled 'adjustment amounts' with a dropdown menu showing 'Deduct Greater' and 'Deduct Lesser' (selected). Below it, a table shows 'Amount' with a value of '\$50.00 : Max of 50.00 % of Net'.

By adding a period max we prevent Enterprise from double dipping into the same period. This way, the employee will never be over garnished.

Similarly, you may want to consider adding a Max Lifetime:

Enterprise automatically tracks the amount garnished on every adjustment, so following an example when we have someone who owes a total fixed amount (\$1,000), we enter that as the max lifetime and once that has been garnished the adjustment automatically deactivates.

adjustment amounts + ✎ ✕

Deduct Greater  Deduct Lesser

|                                  |             |                                     |                |           |
|----------------------------------|-------------|-------------------------------------|----------------|-----------|
| Amount                           | Adjustment  | Garnish1                            | Note           |           |
| \$500.00 : Max of 50.00 % of Net | Description |                                     | Sequence       | 5         |
|                                  | Active      | <input checked="" type="checkbox"/> | Date Served    | 2/21/2019 |
|                                  | Frequency   | Weekly                              | Max Monthly    | \$0.00    |
|                                  | Start Date  |                                     | Max Yearly     | \$0.00    |
|                                  | End Date    |                                     | Max Lifetime   | \$500.00  |
|                                  | Authority   |                                     | Period Max     | \$0.00    |
|                                  | Case Number |                                     | Min After Calc | \$0.00    |

**\*Note\*** If the adjustment you are setting up does not have a "max lifetime," (like the \$1,000 in this example) leave this field blank and select the active checkbox within the detailed adjustment if/when you are ready to deactivate.

### Where is this Money Going?

If you are deducting money from an employee's check, the money more than likely needs to be redirected to another source.

For example, a levy would more than likely need to be sent to the IRS, a child support would need to be directed to the proper agency, county, etc. You may want to have your own company as an authority for generic garnishments if you need to report or track these garnishments through Enterprise.

There are 2 sections that you can use to denote where this money is going:

### Authority & Case Number

The authority field on any employee adjustment will help you determine where a child support, levy, or other adjustment is going. This will be used to create [Authority Checks](#) and for [Authority Reporting](#).

|             |                                     |                |           |
|-------------|-------------------------------------|----------------|-----------|
| <b>Main</b> | Pay/Misc                            |                |           |
| Adjustment  | ChildSup2                           | Note           |           |
| Description |                                     | Sequence       | 1         |
| Active      | <input checked="" type="checkbox"/> | Date Served    | 2/21/2019 |
| Frequency   | Weekly                              | Max Monthly    | \$0.00    |
| Start Date  |                                     | Max Yearly     | \$0.00    |
| End Date    |                                     | Max Lifetime   | \$0.00    |
| Authority   | Ashland County Child Suppor         | Period Max     | \$100.00  |
| Case Number | 1234567                             | Min After Calc | \$0.00    |

Along with Authority, we highly recommend utilizing the Case Number field. Most adjustments that require an authority will usually also have a case number. This can be extremely helpful for reporting purposes and for your records incase anything happens to the paper notice you received.

### Routing & Account Number

If you are setting up secondary direct deposit for an employee, this money is not going to another source but

instead to another bank account. On the adjustment, navigate to the Pay/Misc tab to enter the proper routing and account number.

- If you are utilizing pre-notes than the dates underneath will work the same as they do for the [primary direct deposit](#).
- If you are not using pre-notes, you do not need to worry about the date fields below the account number.

| partial electronic payment |                 | misc info     |  |
|----------------------------|-----------------|---------------|--|
| Routing/Transit            | 012324782       | Misc 1        |  |
| Account Number             | 987654321       | Misc 2        |  |
| Account Type               | Savings Account | Misc 3        |  |
| PreNote Sent               |                 | EINC          |  |
| ...Approved                |                 | Monthly Cycle |  |
| ...Disapproved             |                 |               |  |

For more information, check out [How to Set up a Secondary Direct Deposit](#)

## Deduct Greater or Deduct Lesser

You can have multiple adjustment rules for more complex adjustments.

For example, an adjustment that should take 10% of the total check or \$25 - whichever is less.

To do this, after you create your first rule you'll be able to add a secondary rule in the lower left:

| Amount         |
|----------------|
| 10.00 % of Net |

Once you have the second rule you will be able to choose between deduct greater or deduct lesser above the rule amounts.

| Amount         |
|----------------|
| 10.00 % of Net |
| \$25.00        |

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